Watonwan County requested workers to send the supervisor their thoughts on banking. (7/2011) These are some of the responses.

HI
My name is … and I too had lots of questions regarding the case banking.
I was very happy doing my own case load of food support and ma. I was doing ok managing my case load for the most part.
We divided up the work into four parts. 1 person does all the intake applications, hc applications and recerts.
She your front person meets and greets everyone she needs to be a detailed person as she is the one talking to the people first so she need to do case notes and fill out the forms so that us who are processing know what is going on.
Once she gets the information on the first day she enters in what she has lets them know what they need to bring back.
She then brings back the folder with papers in it and if she has everything needed to process it goes into the process drawer which is divided by dates (that all paper work is there) and is processed accordingly if it is not complete them it goes to the pending drawer by last name and as we get the mail in and get all that is need to process it will need go to processing again by the date all info comes in.
Two people do the processing and I'm one of them and I also get the mail and separate it out by putting what is needed it in the pending cases and then putting cases in the pending drawer if complete or back into the pending if they haven't brought in all that is needed.
My coworker takes all reviews and checks them to see if they are complete and send out the verification forms and helps with the change report forms and mis. info.
We have one person answer the phone and she also works the dails. She also does look at mail and takes the things that are easy to do while she is on the phones.
It's great not to have to answer the phone and deal with clients but sometimes we still have questions on case but we do mail out spec memos if we need things but sometimes you will need to call.
One thing that you have to get use to is you no longer have your own case load you have everyone's and not everyone did things the way you did but you just correct those that need correcting and you also learn that maybe their way was better than yours.
If we did not have case banking now I 'm not sure where we would be at as we are two works down so we have a different person trying to help us with intakes and I'm the only one processing so are really busy but I have a handle on it and other workers can come in and help process as the case are in pending and they know everything is there and it should be ready to go.
And you just all work together as a team the first couple of months you have to iron things out but you just have to remember it will come together I also think it brings you closer together with coworkers good or bad you have to talk and work it out.

I do think as a worker you become positive of your clients and case load and that everyone needs to remember is that we are all doing things to help our clients and this case banking helps us do a better job and I do think it get faster with time.

If we miss something someone else may find it .

We don't put each other down if miss something as we all can do that as long as it's not all the time if it is then we need to get it fixed.

Well hope I haven't rambled too much but it will work.

I will tell you funny we put all the cases together and emptied some drawers so we could have two pending drawers and two processing drawers and we have yet to fill or use the second drawer on either pending or processing. We consider that great!

Have a great day and give it a try you'll like it.

Hi Angela- I am responding to your SIR email regarding case banking. I was overwhelmed with my case load before we started case banking (I do family cases for Food Support, Medical Assistance, Minnesota Care, Cash & Childcare Assistance). I couldn't keep up and was stressed beyond measure. I have to say at the beginning of our case banking it was very hard to get everything organized and keep up….but once we got everything figured out it has been going very, very well. We have a whiteboard in one of our offices and we would write things down as they came up. Every morning our team meets at 8:00 and we talk about what's on the board (now we're lucky to have something written on it once every 2 weeks!) and we talk about what each of our roles are for the day. We also have broken down our responsibilities by four (the amount of members on our team) and we have a list typed up showing what each person is responsible for depending on if you're doing interviews, processing, etc. On our Outlook calendar we have 4 roles listed and each person's name by them – these are rotated weekly through the end of the year. We generally keep up. We are much more efficient together than each of us was alone. It's also nice if you're gone a day or on vacation that everything isn't just sitting there waiting for you when you come back. On our team we are all cross trained to do everything for each of the programs. Communication and case notes really play a huge part in our success.

The only drawbacks that I can think of are we don't have the connections with the clients like we did before (we rotate interviewing, phone calls and processing) And the other drawback is if everyone is not pulling their weight and putting 100% in. We all have days that we aren't driven as much as others but sometimes you'll have someone not putting in enough effort. We have 1 team leader and he usually deals with any issues with each of us if they come up.

We all communicate and get along very well together. At this point I would never go back to having my own caseload!

I am part of a 2-person elderly/disabled case banking unit. We started case banking the week of May 15. I am "new" to LTC and elderly cases and was previously working with singles and adults. So not only   am I learning a whole new workload, but also learning the case banking process. While I was training for this position, the previous LTC financial worker had been ill on and off for the previous 4 or 5 months and wasn't able to keep up on her cases. So, when we started case banking, some applications were well over due.

1st of all, I was amazed at how quickly we were able to catch up on the overdue applications because of the case banking. I believe we had all applications caught up within 2-3 weeks and have been able to process applications timely since.

The positives of case banking that I have seen:
1.   Clients are almost always able to contact a FW right away, or else receive an immediate call back due to having one of us always available for phones. These calls are taken care of right away and this has resulted in less calls from clients when previously we were unable to return calls right away. Clients seem to be happier with this immediate response.
2.   Applications are processed timely due to having one of us always on processing while the other is on phones and appointments. The "processor" is able to concentrate on the work and not have the interruptions that would previously have caused delays in processing.
3.   We have been communicating well with each other to discuss problems, uncertain program policies, changes, etc. in order to provide consistent and accurate results for our clients.
4.   An extra set of eyes looking at cases has provided more accurate approvals and changes to cases. These are usually found during reviews, or when changes are reported, or completing a pending application that someone else has started.
5.   There doesn't seem to ever be that pile of paperwork that you will get to someday, or when you can focus better, etc. That is always included in the daily work and gets completed timely.
6.   The structure and organization of the case banking seems to have improved processing time for all paperwork received from applications to verifications received to changes reported.

7.   Now we get to share the difficult cases and clients which reduces stress in our day to day production.

8.   By working together, we have learned to compromise on how to affectively complete our assigned tasks and duties to gain a stronger sense of organization and control over our workload.

9.   When returning from time off, there isn't a pile up of applications, paperwork and phone calls to return, this has already been taken care of while absent. This helps to enjoy the time away or not feel so guilty at having to take time off.

10. Our communication with each other has improved greatly and I feel that the workload is shared with my fellow worker instead of feeling like the only one that can take care of certain things. This has been a great stress reliever.

11. As a "new" worker to Elderly/LTC unit, case banking has helped me convert easier due to not bringing in old ways that don't exist. I was able to learn from my fellow co-worker using their direction and guidance to help me learn my "new" position.

There really isn't much that is negative, but can give some examples of what some thoughts were and the results…

1.   Financial workers not wanting to give up control of their cases. Although it seemed we had to "pry fingers" from certain cases, once they had let go, they discovered that other financial workers were able to handle these cases/clients and are able to give the same quality of care.

2.   Clients not wanting to talk with anyone else. Bottom line is that the clients want their benefits and it really doesn't matter who they end up talking to. Some clients may need to be persuaded more than others, but a simple explanation usually made them understand, especially if you say something like, "you're so lucky, you now have 2 financial workers working for you".

3.   Financial workers thought case banking would be like an assembly line. Once case banking had started, they had realized this is not the case. We still give the quality of care we always had, but I feel that it is more organized and unified in our decisions and conversations.

4.   Not knowing where the other worker had left off on a case because that worker has it all in his/her head. Case noting and TIKLing has improved

drastically -- when a client calls or when you pick up a pending application, you need to know right where the other has left off. You don't want to waste time going through the case again. Unified case notes and TIKLs are key in great case banking. Once this had been implemented, it was amazing how fast things were able to get accomplished. We also feel confident if QC gets ahold of these cases. 5.   Worrying about other workers finding mistakes and pointing fingers. We work as a team and when mistakes arise, we talk about it as a team, without pointing fingers, to make sure we are all on the same page. Of course, people interpret policy in different ways. Once we discuss this, then we can come up with a unified answer. If we cannot, then we may need to request policy clarification from supervisors or health or policy quest.

All in all, change is scary. We had numerous meetings, discussions and requests to other counties for instructions on how they process and maintain cases. We had tweaked them to fit our needs and eventually jumped in and we continue to make changes as we go. I feel that after doing case banking for only a couple of months, I cannot see that we would ever go back to single caseloads.

I am the perfect example of a worker digging in her heals. Just ask Wendy. I carried a case load of 380 prior to case banking and dug in my heels and put up a brick wall as I called it. I felt I would lose the communication skills with the providers I work closely with, lose the trust and confidence my client had in me and I didn't want to be working on an assembly line. I do have to admit it was just the fear of the unknown. Turned out to be totally different than what I was thinking.

Case Banking is the best thing ever; I would hate to go back. I use to have those piles of work I just couldn't find time for but with the filing system and the work routine's we have set up I don't have those piles anymore. I also don't feel the stress as much as before. If I'm struggling with a case I know I have a partner to work thru the issue and that they are more than willing to help because it is their case also and they need to be involved in the difficult ones. I am fortunate to work in a case bank unit that has only 2 workers. We work very well together with communication and have a routine set up that works just

great with two of us. For 4 days one worker is on intake, taking all calls, walk-ins, conducting interviews if necessary, taking review appt's, monitoring outlook, SIR emails and so forth. I often call it "putting out fires" We are available for internal contact with the agency workers also. The other worker processes as much paperwork as they can in those 4 days. It's nice the fact that you can concentrate so closely on a file and know you will not have interruptions as before. It seems like we have so much more control over the caseload as before.

Hope this helps.

 Thanks for your e-mail. I will see if I can answer some of your questions about case banking.

I know a lot of counties are considering the case banking model. Tracey is a great advocate for the model. However, she does not work as a financial worker in a case banked system.

The reason Otter Tail County decided to do the case banking method is because we have had a hiring freeze for some time and have been short workers. However, with case banking there is still the same amount of work and you still need the same number of people to do the work. It also seems to take longer to do the task since work is duplicated; there may be three or four workers who touch a case to do a task.

Prior to starting case banking we had an adult unit, family unit, health care unit and LTC unit. The reason the health care unit was formed 4-5 years ago was so the adult and family workers could concentrate on the cash and food support programs and also the health care programs had become more complex and were on the rise. When case banking started the health care unit was disbanded. Three of the four members of that unit went to the adult unit and one (me) went to the family unit.

The health care unit was disbanded because we needed more individuals to fill the case banking duties of: phone bank, processing bank and intake (interview) bank. What we have found out is that it takes much longer to process a case now because one has to read several case notes to figure out what is going on in the case first before anything can be done. We have been case banking for three months now and will be rotating duties the first of June. The phone people (two in the adult unit and two in the family unit) and the intake people have really gotten burned out. Therefore, they have decided to rotate every month and see how that goes. I spent one month in interviewing and the last two in processing. I would be scheduled to go to phones next. However, I applied for and accepted a job as a child support officer so I will not have to sit in a cubie and answer phones all day; along with going through volumes of mail and writing up trouble tickets.

I believe case banking probably works better for the adult unit because their programs are not so complex. The family programs have employment services, sanctions, more over payments, cost effective insurance reimbursements and hcapps for preg women have a tighter time frame for approval just to name a few differences. The family cases just need to be monitored a little closer. It is difficult to pick up a case, do what you can on it then put it back in the "pool" for someone else to pick up when the verification you requested comes in. Who knows when the case will be picked up again? If I am the one picking it up again I need to read case notes to figure out what I need to do and for which program. Errors are often found. I feel I am making more errors and I am not the one that will necessarily have the opportunity to correct them. Morale in the office has gone downhill.

We also have more of a hurdle with case banking in Otter Tail County since we have two offices about 50 miles apart. It is difficult to get everyone on the same page and work as a team when there is so much distance. We receive most of the phone calls and receive most of the mail in the Fergus office. That leaves the New York Mills office to do intake and process but we also have to have one intake person in Fergus along with a couple processors since the majority of the mail comes here. That means the majority of the intake/recert interviews are in-person in Fergus versus phone interviews. Doing 3-7 interviews a day, every day, along with processing emergency assistance, expedited food support and entering what can be entered in MAXIS and, of course, extensive case notes since the interviewer will not be the one to approve results leads to burn out. Having two offices has gotten to be a logistic problem. Sometimes a great deal of time is spent just searching for paperwork or trying to connect paperwork for a case when the paperwork is sent in at different times. Case notes are very, very important. Therefore, extra time is spent case noting when paperwork is received.

The positive in all this is that financial workers can be gone and not have a pile of work in their cubie to do when they get back (it piles up in a different location)! In the end, once Otter Tail County gets the number of financial workers they needed in the first place, it is hoped case banking will go smoother.

Thanks again for keeping in touch. Sorry I am not as positive about our case banking situation as I would like to be. My co-workers say I am bailing on them. It is true, if we had kept a health care unit I wouldn't have looked for a different position. Ideally if there were enough workers to case bank it would have worked better to keep the health care unit (like the LTC unit). Tracey talks about "Aces in their places". I was an ace in my place with health care. Learning new programs along with a new method of processing (case banking) was a bit much for me. It appeared to me that it was becoming more about the programs than the people (like an assembly line). I was a very comfortable as a health care case worker so I needed this push to look elsewhere -- if I have to learn new stuff I might just as well learn new stuff somewhere else.